Salesforce Sales Cloud Training

COURSE CONTENT

About Multisoft

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About Course

The Salesforce Sales Cloud training provided by Multisoft Systems aims to equip participants with the knowledge and skills necessary to design, deploy, and support Salesforce applications, thereby supporting customer business processes.

Module 1: Industry Knowledge

- ✓ Explain the factors that influence sales metrics, KPIs and business challenges
- ✓ Explain common sales processes and key considerations

Module 2: Implementation Strategies

- ✓ Given a scenario, determine how to facilitate a successful consulting engagement (plan, gather requirements, design, build, test, and document)
- ✓ Given a scenario, determine appropriate sales deployment considerations
- ✓ Given a scenario, measure the success of a Sales Cloud implementation project

Module 3: Sales Cloud Solution Design

- ✓ Given a set of requirements, design an end-to-end sales process from lead to opportunity to quote to close to order
- ✓ Given a scenario, analyze customer requirements to determine an appropriate solution design considering capabilities, limitations, and design trade-offs
- ✓ Given a scenario, identify an appropriate approach when designing the lead conversion process
- ✓ Describe the implementation considerations when designing a sales process
- ✓ Given a scenario, determine when it is appropriate to include custom application development or a third-party application
- ✓ Describe the appropriate uses cases for Account and Opportunity Teams and the effect on sales roles, visibility, access, and reporting
- ✓ Explain the capabilities and use cases for territory management
- ✓ Explain the capabilities, use cases and design considerations when implementing Orders
- ✓ Explain the capabilities, use cases and design considerations of Salesforce1 Mobile App pertinent to the sales process

Module 4: Marketing and Leads

- ✓ Explain how marketing capabilities support the sales process
- ✓ Given a scenario, recommend appropriate methods for lead scoring and criteria for lead qualification
- ✓ Explain the best practices for managing lead data quality

Module 5: Account and Contact Management

- ✓ Identify use cases and design considerations for social accounts and contacts
- ✓ Explain how the ownership of account and contact records drive visibility of related sales information such as opportunities, activities, etc.
- ✓ Explain the various methods for establishing relationships between accounts and contacts
- ✓ Explain the impact of having an account hierarchy
- ✓ Explain the methods for populating and maintaining account and contact data using data enrichment tools
- ✓ Explain the use cases and implications for implementing person accounts

Module 6: Opportunity Management

- ✓ Given a set of requirements, determine how to support different sales process scenarios
- ✓ Given a scenario, determine the relationships between sales stages, forecast and pipeline
- ✓ Describe the relationships between opportunities to assets, product line items and schedules, price books, quotes, contracts, campaigns, etc.
- ✓ Given a set of requirements, determine the appropriate forecasting solution
- ✓ Describe the impact of multi-currency on opportunities

Module 7: Sales Productivity

- ✓ Given a scenario, determine the key features that help to enable and measure sales productivity and adoption
- ✓ Identify use cases and considerations for using email and productivity tools
- ✓ Given a scenario, identify the appropriate mobile solution to improve sales productivity
- ✓ Describe how Chatter enables collaboration in the sales process
- ✓ Explain the use cases and best practices for using Content vs. Chatter Files in the sales process.
- ✓ Explain the capabilities and use cases of work.com pertinent to sales productivity

Module 8: Communities and Site Management

- ✓ Explain the use cases for Communities and sites in the sales process
- ✓ Identify the impact of enabling Communities

Module 9: Sales Cloud Analytics

- ✓ Given a set of desired metrics, determine the appropriate report, dashboard or analytic snapshot solution
- ✓ Describe the implementation considerations of multi-currency on reports and dashboards

Module 10: Integration and Data Management

- ✓ Explain the use cases and considerations for integrations common to Sales Cloud implementations
- ✓ Explain the use cases and considerations for data migration in Sales Cloud
- ✓ Given a scenario, analyze the implications and design considerations of large data and transaction volumes